



# **2005 Marketing Update**

## **- Japan -**



# **2004 Market Review**

# Market Recovery

**For the first time since 1997, Japanese arrival to Hawaii increased.  
Three additional flights launched by United Airlines, North West Airlines  
and Continental Airlines**

	<u>Visitors</u>	<u>Air Seats</u>	<u>Load Factor</u>	
1997	2,222,650	2,986,762	74.4%	Peak Year for Hawaii
1998	2,004,354	2,691,481	74.5%	
1999	1,825,586	2,456,836	74.3%	
2000	1,817,644	2,437,584	74.6%	Peak Year for Overseas Traveler
2001	1,507,980	2,160,581	70.7%	9.11
2002	1,484,770	1,961,733	75.6%	SARS, Iraq War
2003	1,328,820	1,785,277	74.2%	
2004	1,480,000	1,792,377	82.6%	
2005		1,900,000		

# Substantiation of 2004 Marketing Results

- **The images of Hawaii HTJ has been communicating are being solidly established.**

## **Impressions of Hawaii**

"Has many places to visit"	47.5%	→	66.0%
"Has good food"	18.1%	→	37.2%
"Has history"	16.2%	→	33.7%
"Has beautiful nature"	24.2%	→	37.8%
"Energetic"	49.5%	→	68.8%
"Something to aspire"	32.9%	→	42.5%
"Sophisticated"	27.8%	→	34.3%
"Has traditions"	13.7%	→	29.0%

Source: Dentsu survey, June 2004



# **2005 Marketing Strategy**

# Challenges

1. **The number of travelers to Hawaii is growing but approaching the saturation point.**
  - It is necessary to improve the quality of tourists, in terms of length of stay and spending.
2. **Compared with other resort destinations, Hawaii is still weak in the images of “being unique,” “has tradition” and “mysterious.”**
  - It is necessary to enhance these images for Hawaii by communicating its unique culture and history.

# Marketing Strategy

**By capitalizing on Hawaii's unique culture and history:**

- 1. Continue to strengthen the image of Hawaii as a destination that “has depth” and “high quality.”**

As in 2004, communicate Hawaii as a “destination that is worth going to and spending extra time and money for” because of its charm and value, and create an impression that Hawaii is distinctly different from other destinations. Establish a perception that Hawaii is and will always be a “cool” place to visit.

- 2. Cultivate quality visitors by proposing new purposes for going to Hawaii.**

Seek to increase tourist spending by providing new purposes for visiting Hawaii, such as education, sports, spa, and anniversaries and encourage more spending out of the non-leisure portions of their budgets.

## Communication Concept

# Discover Aloha

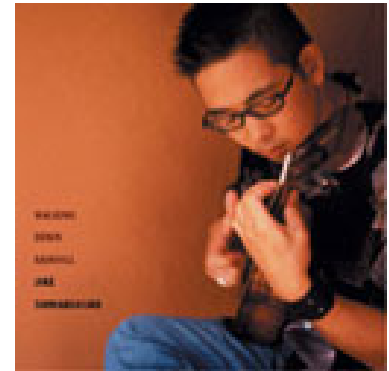
In 2005, we will communicate Hawaii's unique culture, tradition and history to convey in depth the charm and aloha spirit of Hawaii.



# Communication Motifs

- The word “Aloha”
- Aloha shirts
- Leis/Lei Day
- The 120th anniversary of official Japanese immigration, “Kanyaku Imin”
- The Aloha Spirit
- Aloha Friday
- Hokule’a

<b>A</b>	<b>Akahai:</b>	<b>Compassion. Respecting others</b>
<b>L</b>	<b>Lokahi:</b>	<b>Cooperation. Helping others out</b>
<b>O</b>	<b>Olu’olu:</b>	<b>Joy. Tender feelings toward others</b>
<b>H</b>	<b>Ha’aha’a:</b>	<b>Humbleness. Being humble with regard to others</b>
<b>A</b>	<b>Ahonui:</b>	<b>Patience. Accepting others</b>



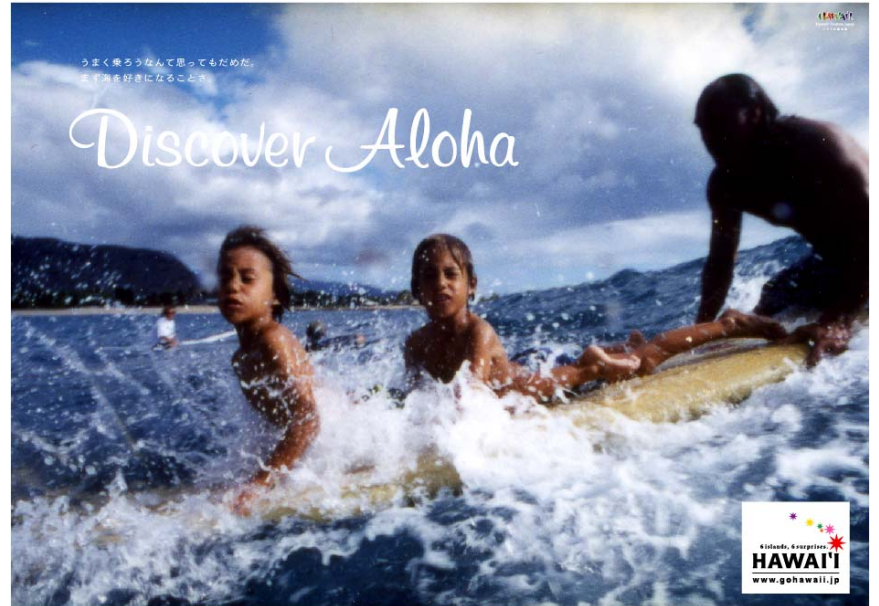
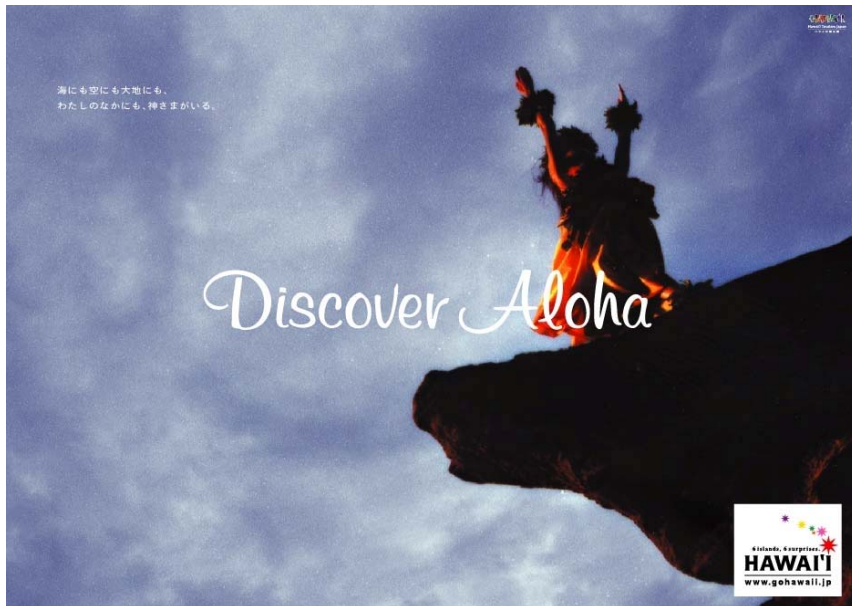
# Communication Targets

- All audience groups, with special focus on strategic markets:
  - Active Seniors
  - Families
  - Weddings/Honeymooners



# Communication Themes

- Surfing
- Paniolo
- Hula
- (- Hokule'a)





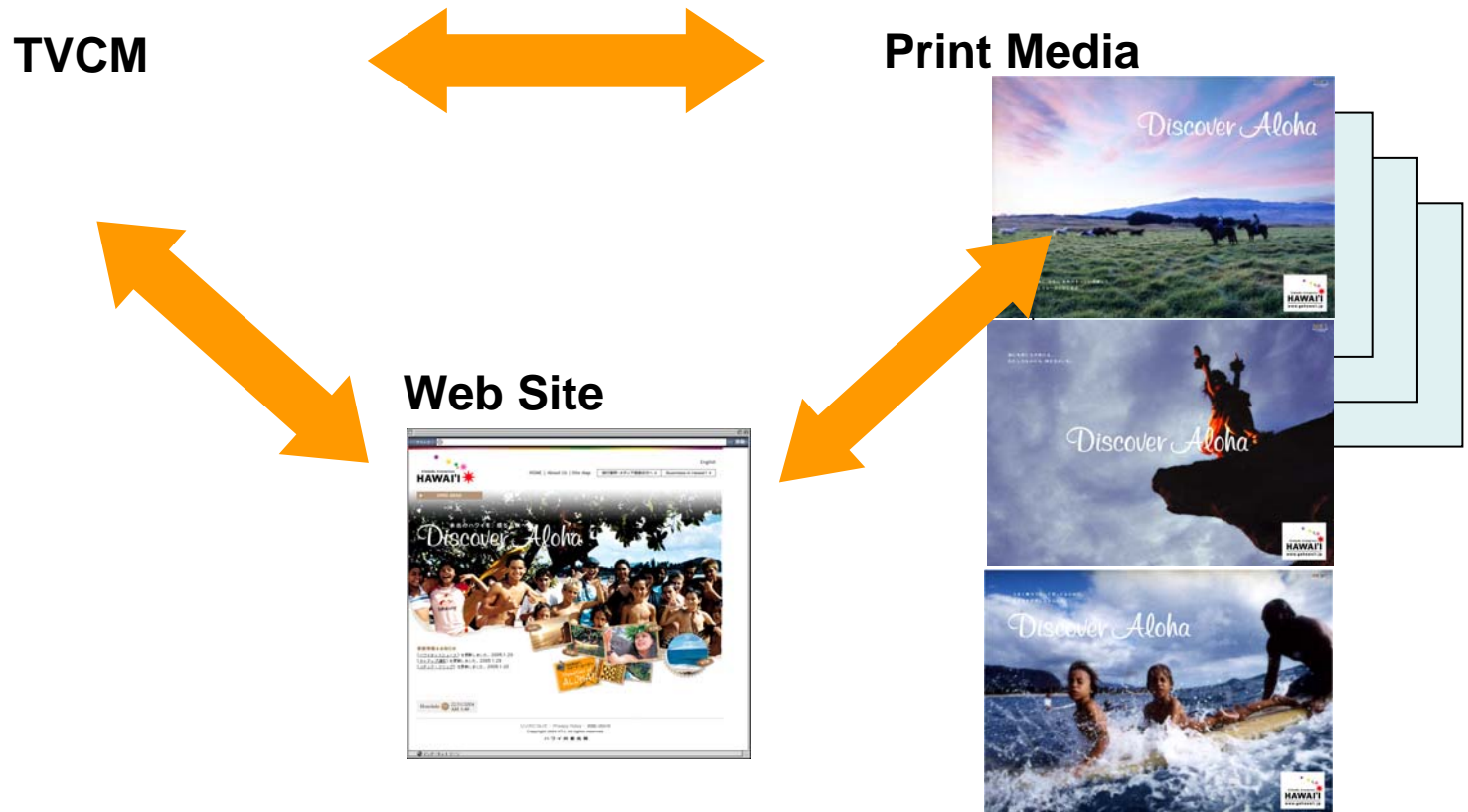
# Website

- Important Considerations for the site renewal:
  - Further improve the quality of contents based on the “Discover Aloha” concept.
  - Enhance:
    - 1) Entertainment quality
    - 2) Interactivity
    - 3) Support for travel trade
- Major New Contents
  - “Hawaiian Workshop”
  - “Aloha People”
  - “Aloha Theatre”
  - Downloadable maps



# Campaign Execution

- TVCM: Create interest.
- Print Media: Communicate stories in greater depth.
- Web Site: Follow up on peripheral information



# Collateral Materials

## ➤ “Discover Aloha” Island Maps

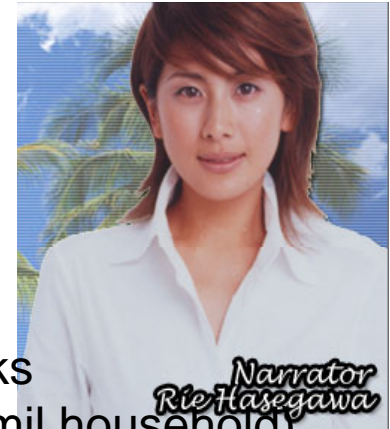


## ➤ “Discover Aloha” Brochure





# “Deep in Aloha” Special TV Program



- Broadcast time: 10:54 p.m. – 10:59 p.m.  
Every Thurs. Jan. – Mar. '05, 13 weeks
- TV station: TV Tokyo (Approx 5% viewership, 17-mil household)

This program delves into the profound attractions of Hawaii through the people who make traditions and culture of Hawaii part of their lives, and who embody the spirit of Aloha.

- |                             |                   |
|-----------------------------|-------------------|
| #1 Ms. Marylouise Kekuewa   | Feather Lei       |
| #2 Mr. Derek Ahsing         | Lomilomi Massage  |
| #3 Ms. Margaret Keahi Leali | Coconut Postcards |
| #4 Mr. Didi Offermann       | Art Show          |
| #5 Mr. Alan Akaka           | Steel Guitar      |

# Promotional Events

- Under “Discover Aloha” concept, develop events with focus on the culture and aloha spirit of Hawaii.
    - Provide the audience with authentic experiences of Hawaii.
    - Aim for integrated communication with mass media, Web, and PR activities.
    - Capitalize on the unique traditions of Hawaii, such as “Lei Day,” “Aloha Friday,” etc.
1. Golden Week Promotions: Tokyo/Hiroshima/Sapporo
  2. May 2 & 3, June 4, July 31 & August 1: Aichi Expo
  3. Summer Promotions: Tokyo/Yokohama/Osaka/Kobe
  4. Sept. 22-24: JATA World Travel Fair







# Travel Trade Programs

- Collaborate with other Hawaii promotion groups:
  - HPCE (Hawaii Promotion Committee East)
  - OHPC (Osaka Hawaii Promotion Committee)
  - JHEC (Japan Hawaii Economic Council)
- Work closely with trade media to produce special features on Hawaii.
  - Travel Journal / Travel Vision / Wing Travel
- Hold Seminars & Workshops: e.g. '05 Jan. seminars in Tokyo, Osaka, Nagoya.
- Organize travel trade and media FAM tours.
- Issue monthly e-mail newsletters, mail magazine



# Travel Trade Programs: Hawaii Specific

- Monthly e-mail newsletters
- “What’s New”: Web information listing of new and news worthy information
- Workshop participation opportunities: e.g. Tokyo/Osaka/Nagoya in Jan.
- Media tie-up opportunities
- Travel trade and media FAM tours
- JATA World Travel Fair: Sept. 22-24, 2005 Big Sight, Tokyo



